

Running Effective Meetings

Instructor Manual

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RUNNING EFFECTIVE MEETINGS

Participant's Manual

OFFICE OF ORGANIZATION AND HUMAN DEVELOPMENT

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RUNNING EFFECTIVE MEETINGS

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INTRODUCTION

RUNNING EFFECTIVE MEETINGS

SCHEDULE

FIRST DAY

8:30 - noon Introduction and Overview of the Course
 Meeting Basics
 Module I: Planning
 Moudle II: Conducting
 1:00 - 4:00 Conclude Module II: Conducting
 Module III: Following-up on a Meeting

SECOND DAY

8:30 - noon Review of First Day Modules: I-III
 Building on the Basics
 Module IV: Task and Human Interaction
 Moudle V: Problem People
 Module VI: Recorder
 Module VII: Film
 1:00 - 4:00 Module VIII: Meeting Simulation
 Module IX: Action Planning
 Module X: Close (Review)
 Course Evaluation

RUNNING EFFECTIVE MEETINGS

PREFACE

"Running Effective Meetings" is designed to make meetings more productive and satisfying to its participants. In consultations with offices, regions, and divisions, it was observed that meetings frustrated participants and accomplished very little. Managers and staff both agreed that meetings were more of an unpleasant ritual than an effective work mechanism. However, they were uncertain about how to improve the situation.

This course attempts to show how meetings can be more effective. It also provides participants with practical guidance that when used will enhance the structure and final outcomes of their meetings.

RUNNING EFFECTIVE MEETINGS

Overview of the Course

OVERVIEW

This course recognizes that meetings are the life blood of many organizations, yet are frequently poorly conceived and aged. The course, therefore, begins by emphasizing the practical aspects of planning a meeting, starting with defining objectives and considering alternative ways of achieving those objectives. To assist in applying the planning concepts, the participants will complete a sample agenda and role play portions of one of their upcoming meetings. In managing a meeting, the course provides some techniques for staying focused and includes a segment on dealing with "problem people."

As a comprehensive closing, participants are then given the opportunity to integrate and practice the course concepts by simulating a meeting.

A variety of training methods are used, including brief lectures, small and large group discussions, individual exercises, class presentations, simulations, and a film.

PURPOSE

The course is designed to provide meeting initiators, usually leaders, with the basic components of an effective meeting. From the course, initiators should be able to determine and address desired outcomes through planning, conducting and following up basic group gatherings.

GOAL

The goal of "Running Effective Meetings" is to provide meeting initiators, usually leaders, with the basic knowledge, skills and abilities to more effectively plan, conduct and follow-up their meetings.

OBJECTIVES

The objective of the course are to have initiators

- a. Prepare a meeting agenda that clearly specifies desired meeting results and provide other information necessary to achieve these results.
- b. Establish a tone and provide a context for the meeting that encourages the type of participation required to best achieve the desired outcome(s).
- c. Identify and record critical meeting outcomes and formulate them into an action plan.
- d. Use the action plan as a basis for monitoring participants' assignments.
- e. Oversee the task and human interaction of the meeting to effectively achieve the meeting objectives.

RUNNING EFFECTIVE MEETINGS

AGENDA

MODULE I: PLANNING A MEETING

In many situations that require a solution, a plan is essential. This is true in running an effective meeting. The planner needs to consider several factors, including meeting type, alternatives, goals, attendees, and the environment.

MODULE II: CONDUCTING A MEETING

Conducting an effective meeting is enormously simplified when the leader can follow a realistic plan. The plan's details, captured in an agenda, guide the task thereby allowing the manager to balance his/her attention between task and group interaction.

MODULE III: FOLLOWING UP A MEETING

When a meeting ends in task assignments, especially multiple assignments to many participants, a simple record should be made. In this way the manager can easily monitor progress and ensure completion of assignments.

MODULE IV: TASK AND HUMAN INTERACTION

All meetings are a human event where manager, initiator, and emotions interact freely. In addition to structuring the meetings to get the task done, the manager should attend to the group's interpersonal relations, i.e., the process. If the manager can guide the task activity while harnessing the process energy, the group's output and satisfaction is likely to rise significantly.

MODULE V: "PROBLEM PEOPLE"

People with all types of constructive and obstructive motivations attend meetings. What should a meeting holder do when or "problem people" attend meetings? Module V answers this question and in doing so heavily draws from participants' experience.

MODULE VI: RECORDER

Information exchanged in a meeting has a way of being misinterpreted, unnecessarily repeated, or lost. Solving these and other information problems can be accomplished by employing a meeting recorder. Responsibilities of a recorder include capturing key ideas and facilitating accuracy by making participants' comments visible.

MODULE VII: FILM - "Meetings, Isn't There a Better Way?"

The film depicts the common frustrations of an ineffective meeting and specifies the components of an effective meeting. The 30-minute film highlights the kinds of meetings held and how the meetings can achieve the initiator's desired outcomes.

MODULE VIII: MEETING SIMULATION

This behavioral simulation (optional, depending on time) provides participants the opportunity to practice what they have learned. One small work group conducts a meeting while remaining participants observe and provide feedback.

MODULE IX: ACTION PLANNING

Participants are given the opportunity to prepare a realistic plan on how to apply course learning in their jobs. The emphasis is on those segments which participants feel are most important. A structured form assists by asking a series of important questions such, as "What do you want to do?, What will you do?, "How will you do it?," etc.

MODULE X: CLOSE

This brief module summarizes the course, highlights the essential components of an effective meeting, and encourages participants to apply the material on the job.

RUNNING EFFECTIVE MEETINGS

Summary of Meeting Components

Leaders can improve their effectiveness when they:

1. Plan a meeting by:
 - a) defining desired outcomes.
 - b) considering alternatives to having a meeting.
 - c) selecting the right attendees.
 - d) preparing and distributing in advance a complete agenda.
 - e) creating the right environment.
2. Conduct a meeting by:
 - a) creating and maintaining a positive tone.
 - b) following the agenda.
 - c) dealing with the human side of enterprise.
 - d) capturing key concepts.
 - e) closing effectively.
3. Follow-up a meeting by:
 - a) creating an action plan.
 - b) monitoring the action plan.

MODULE I

RUNNING EFFECTIVE MEETINGS

Module I: PLANNING A MEETING

SYNOPSIS

In many situations that require a solution a plan is essential. This is true in running an effective meeting. The planner needs to consider several factors, including meeting type, alternatives, goals, attendees, and environment.

OBJECTIVES

Participants will be

1. able to understand and write a desired outcome.
2. aware of alternative ways of achieving desired outcomes.
3. aware of factors to consider when selecting attendees.
4. able to prepare a comprehensive agenda.
5. more sensitive to the environment, e.g., room, seating, etc., in which a meeting occurs.

Defining Desired Outcomes

As a meeting leader you are naturally interested in achieving results whenever you bring your people together. Review the following list and decide if each item is a clear statement of a desired outcome.

1. Information sharing on various issues within Segment 7 of our Audit Program (999111). Yes No
2. Team building within work group. Yes No
3. Reach decision amongst the 3 procedural alternatives for MICOM time sharing in our work group. Yes No
4. Share information on how to use Tom's modified procedure for using Math Pack in auditing corporate balance sheets. (IRS Job Code 999234.) Yes No
5. Budget data required for 3rd quarter. Yes No
6. Work group progress review meeting; weekly. Yes No
7. Decide on data collection techniques in getting cost data -- re: the XYZ audit program, section III. Yes No
8. Generate alternative solutions for addressing the clerical turnover problem in GGD. Yes No
9. Explain the job staffing procedure to all entry level members in NSIAD. Yes No

Clearly Stated	

MEETING ALTERNATIVES

Guidelines for Deciding the Need for a Meeting and Some Alternatives

Purpose/Desired Outcomes	Meeting Necessary?	Consider Instead
1. Work group progress review meeting; weekly.		
2. Team building within work group.		
3. Share information on how to use Tom's modified procedure for using Math Pack in auditing corporate balance sheets. (IRS Job Code 999234.)		
4. Generate alternative solutions for addressing the clerical turnover problem in our division.		
5. Reach procedure alternative for MICOM time sharing in our division.		

Some Thoughts on Who to Invite to Your Meeting:

1. Contributors
2. Beneficiaries
3. Those whose commitment you need
4. Decisionmakers
5. "Politicos"
6. Representatives of interest groups
7. Devil's advocates
8. Facilitators
- 9.
- 10.
- 11.
- 12.

SUGGESTED TECHNIQUES FOR MEETING FACILITATORS¹

- Start the meeting on a positive note, building trust and encouraging participation.
- Help define purpose of meeting, the agenda, and your role in discussions.
- Help group get agreement on a common problem and process before beginning discussion of items.
- "Boomerang" questions back to group members.
- Maintain a constructive, collaborative mood in the group.
 - encourage everyone to participate (especially silent members).
 - positively cut-off long-winded speakers.
 - protect individuals and their ideas from attack.
 - rephrase incomplete ideas from group members.
 - compliment the group for good work.
 - be honest, good humored, and admit mistakes.
- Refer to the agenda and group memory when the group is stuck.
- Summarize, check for agreement, strive for closure and next step on issues.
- Remind group of time--revise pace or agenda as needed.
- Maintain awareness of group moods--check-out your perceptions.
- Whenever possible, step aside and let group move at its own pace.
- Be aware of how you come across to group, including nonverbal communications.
- Help to educate the group on effective ways to work together.

¹Doyle, M. and Straus, D., How to Make Meetings Work, Chicago, Ill., Playboy Press, 1976, pp. 201-211.

CASE STUDIES FOR RUNNING EFFECTIVE MEETINGS

CASE I

A Form 100 from one division comes into your division as a normal matter of coordination. This could be a 2,000 staff days job. It looks to you like this job proposal is similar to the work you are now doing. You have had previous "turf problems" with this division. Moreover, one of your staff members has had repeated confrontations with the EIC who is heading the audit team will be doing the job.

Assume you are the assignment manager. Who should attend the meeting?

CASE II

You are a project manager from a HQ division working on a three-region job. You are planning for the mid-point conference. In thinking about selecting the correct attendees for your conference, several points should be kept in mind. Region "A" tends to be slow in producing job segments. Region "B" consistently disagrees with the job objectives. Region "C", located in the western part of the U.S., has discussed removing all of its people for higher priority work. Up to this point, Region "C" has produced superior work and you would like to keep it on the job. Since the methodological issues, e.g., questionnaires, required for this audit are rather sophisticated, two of your division's DMTAG members are still working on the analysis.

This is an important job which is sure to get high visibility on the Hill. Who should attend the meeting?

CASE III

You are an EIC from a HQ division. The division staff manager has just notified you that he's going to pull one hard working and effective junior staff from your job. You enjoy a good relationship with this person and he has stated a strong preference to stay on your job. Furthermore, rumor has it that the audit site slated to receive your staff member is not that busy.

You have mentioned the rumor to the staff manager, but he maintains that the new site will be "developmental" for your staff member. Who should attend the meeting?

CASE IV

You are an EIC just assigned to a congressional request. Congressman Casey is interested in hospital care cost containment. This is the early scoping phase and you are trying to further define the items in Casey's request.

You decide to have a meeting to define the audit scope and get ideas on how to accomplish the audit objectives. Who should attend the meeting?

A G E N D A

Name
of Group Product Division Date 3/23/76
Problem Solving

Title Session on Cost Reduction Start 9am End 11am
of Meeting

Meeting
Called By Joe Place Room 325

Meeting
Type Problem Solving Background
Materials Report on
February Production
Levels

Desired Please
Outcomes (1) ideas for reducing production costs Bring above material
(2) a plan for detailed action steps

Leader Joe Decisionmaking
Method Consensus

Facilitator Tom Final Decisionmaker
Joe

Recorder Mary Special
Group Members Rico, Janet, Notes This is an
Susan, and Bill important meeting.
Please be on time.

Observers _____

Resource Persons _____

Order of Agenda Items	Person(s) Responsible	Process	Time Allocated
1. Review of financial situation	Joe	Report	5 minutes
2. Develop cost reduction approaches	Janet	Brain-storming	20 minutes
3. Prioritizing	Bill	Ranking	30 minutes
4. Action Planning	All	Discuss	55 minutes
5. Close	Joe	Report	10 minutes

CREATING THE RIGHT ENVIRONMENT
FOR YOUR MEETING

1. Room

- Size of group vs. size of room
- Rehearse with chairs, etc.
- Adequate walls for taping easel sheets, etc.

2. Seating

- Circle--enhances cohesion
- Semicircle--focuses group on task
- Remove vacant seats

3. Body Language

- Consider splitting dyads
- Indicators of attention or withdrawal

4. Atmosphere

- Create formality
- Lighting
- Ventilation
- Relaxed concentration

SUMMARY POINT: Let importance of meeting guide preparation.

MODULE II

RUNNING EFFECTIVE MEETINGS

Module II: CONDUCTING A MEETING

SYNOPSIS

Conducting an effective meeting is enormously simplified when the leader can follow a realistic plan. The plan's details, captured in an agenda, guide the task thereby allowing the manager to balance his/her attention between task and group interaction.

OBJECTIVES

Participants will be:

1. able to write opening remarks and prepare an agenda for an upcoming meeting.
2. introduced to the concepts of task and process human interaction.
3. made aware of points to consider in closing a meeting.

FACTORS THAT CREATE A POSITIVE TONE:

1. Start on time.
2. Introduce participants as needed.
3. Review past efforts; link.
4. Consider allowing each member time to share information at the beginning of meeting.
5. Encourage and allow participation.

DIRECTIONS FOR AGENDA EXERCISE

- I. Two interrelated tasks.
- II. Individually prepare an agenda and brief opening remarks for actual upcoming meeting.
- III. Practice your opening remarks and implementing the agenda outline with one other class participant.
- IV. ROLE PLAY.

Do not merely describe how you intend to open your meeting, rather demonstrate it by role playing. The purpose of this exercise is to gain experience in conducting a meeting by first establishing an effective opening style of leadership.

- V. Consider using any or all of the following opening remarks:
 1. State goals of the meeting.
 2. Introduce participants as needed.
 3. Thank participants for attending.
 4. Encourage members to participate.
 5. Ask participants to help you stay on track.
 6. Solicit reactions to the agenda items with intent of changing as possible.
- VI. Two-part feedback with your partner.
 - A. State what you liked about the other participant's presentation.
 - B. Offer suggestions for improvement.

Please, no rebuttals when receiving feedback.

A G E N D AName
of Group _____ Date _____Title
of Meeting _____ Start Time _____ End Time _____Meeting
Called By _____ Place _____Meeting
Type _____ Background
Materials _____
_____Desired
Outcomes _____ Please
Bring _____
_____Leader _____ Decisionmaking
Method _____

Facilitator _____ Final Decisionmaker _____

Recorder _____ Special
Notes _____
Group Members _____
_____Observers _____
_____Resource Persons _____

Order of Agenda Items	Person Responsible	Process	Time Allocated
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BASIC EXAMPLE

ACTION PLAN FORM

ACTION	ITEM	WHO	COMPLETION DATES	
			TARGET	ACTUAL
1.	Coordinate computerized literature search (Job 99911) at GAO's library.	Theresa	2/15/84	
2.	Prepare work paper bundles for 3 sections of Job 99977.	Mike	3/01/84	
3.	Interview Bill Thomas, Auto Industry Lobbyist per audit plan (Job 999754).	Mary	3/05/84	

COMPREHENSIVE EXAMPLE

ACTION PLAN FORM

ACTION ITEM	WHO	COMPLETION DATES	
		TARGET	ACTUAL
1. Inventory and assemble all data collection materials [i.e., structured interviews and HOS] and confirm adequacy.	Rob and Joe	10/23	10/23
2. Conduct onsite data collection. --Administer HOS to entire staff. --Individually interview regional manager, ARMS, and selected staff filling unique positions. --Conduct group interviews of entire staff, including suboffice.	Dave, Larry, Rob, Milt, and Joe	Week of 10/26	10/26
3. Analyze and summarize interview data for feedback to management.	OOHD Team	Week of 11/02	11/13
4. Discuss with OOHD team members' interview experiences and refine instrument, procedures, instructions, etc., as required.	Rob and Bob	Week of 11/02	12/10
5. Develop evaluation instrument [assume selected HOS questions will supplement the evaluation].	Rob and Bob	11/06	11/06

EFFECTIVE CLOSING OF A MEETING

1. Summarize.

2. Evaluate.

3. Unify.

MODULE III

RUNNING EFFECTIVE MEETINGS

Module III: FOLLOWING UP A MEETING

SYNOPSIS

When a meeting ends in task assignments, especially multiple assignments to many participants, a simple record should be made. In this way the leader can easily monitor progress and ensure completion of assignments.

OBJECTIVES

Participants will be exposed to the elements and use of a basic action plan.

ACTION PLAN FORM

MODULE IV

RUNNING EFFECTIVE MEETINGS

Module IV: TASK AND HUMAN INTERACTION

SYNOPSIS

All meetings are a human event where ideas and emotions interact freely. In addition to structuring the meetings to get the task done, the manager should attend to the group's interpersonal relations, i.e., the process. If the manager can guide the task activity while harnessing the process energy, the group's output and satisfaction is likely to rise significantly.

OBJECTIVES

Participants will be introduced to the concepts of task and human interaction.

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how they react to each other in a group setting, the goals, and the available time as guidelines.

Some groups are quite informal and do not need a written agenda, while others have advance agendas and minutes. Handing out an agenda may be of great help in keeping the group on track, but whether or not you distribute an agenda, the issues and available time should be structured. One useful technique is to put the agenda, in outline form, on a flip chart so everyone can see what has to be done. This can serve as a gentle reminder to those who tend to wander off the track, and help you to guide the group to the next topic. Even if you don't use a written or visual agenda, at least give an overview to the group before you begin.

BEHAVIORS NEEDED DURING THE MEETING

You may have noticed that the term "leader" has not been used so far in this chapter. Yet it is common to begin talking about meetings with the concept of leadership. Leadership style is addressed in the next section because first we should establish what behaviors are needed at meetings. The tendency to blame the leader for a group which is not productive absolves the members of responsibility for what happens within the group. Although the leader's role can be critical, especially in structured situations in large organizations, it is often overestimated. Members can, without threatening the position of the leader, behave in ways which are useful to the group. If you are the "leader" of a meeting, you may assume responsibility for things that the group may well be able to do for itself. In so doing, you are limiting the individual members' capacity to function well on their own.

Rather than focus on who does what, we need to think instead of what the members (as a group) need to accomplish. This view of leadership focuses on what functions are needed for the group to reach its goals. Groups need two primary sets of behavior to work effectively: (1) getting the job or task done—task maintenance; and (2) keeping the group in good working order by focusing on *how* they are functioning—group maintenance.

The seven task maintenance behaviors are initiating procedures, giving information or opinions, seeking information or opinions, making assignments and giving directions, clarifying and elaborating, summarizing and evaluating, and consensus testing. The six group maintenance behaviors are encouraging participation, gatekeeping (monitoring flow of communication), reducing tension, clarifying communi-

¹ O'Connell, Sandra E. The Manager as Communicator, San Francisco, CA; Harper and Row, 1979. Reprinted by permission of Harper and Row Publishing, 1984.

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cation, compromising, and managing differences. Each of these has specific effects on members' willingness and ability to carry out needed task behaviors. A group needs all of these functions if it is to be productive and satisfying to members.

At the beginning of a group's work, goal statement and inquiry are much needed. Later, as solutions are proposed, critical testing and compromising may assume more importance. Supporting and encouraging functions are needed all along, but especially as the group moves toward final decisions. Group work will be effective, then, to the degree task and maintenance functions are supplied by members at the appropriate time.

When functions needed by the group are missing, progress is slow and uneven, frustration builds, and the task may not be completed. If members do not sense or cannot provide what is needed (a summary, for example), it is unlikely that group goals will be met. The key task and maintenance functions can be handled almost completely by one person or by different group members. Whichever approach is taken, people must know *why*, *when*, and *how* to contribute a particular function. Most managers are inexperienced in recognizing the need for group maintenance functions. This is one reason for the poor productivity and feelings of dissatisfaction with many meetings. The effective group member or leader is aware of the types of contributions being made and is able when necessary to provide those which are missing.

Task Behaviors

The seven task behaviors all contribute to getting the job done. Each is used at different times to accomplish the work. The role that each plays will depend upon the purpose of the meeting, the stage of discussion, and the nature of the problem. The ability to use each appropriately can greatly increase the productivity of meetings. For example, when everyone shares a common knowledge of the issues, question asking is more important than information giving.

Initiating Procedures Early in any meeting, someone needs to propose procedures for how the group will work. This proposal may take the form of defining the problem, stating tasks or goals, and suggesting ways to work on the issues. The leader may often help a group by proposing procedures, but the group should have some opportunity to decide how to tackle the task. At the procedure stage, the limits of the group—amount of time, degree of authority, and resources available—need to be specified. Imposing procedures too early can create difficult-

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ties and resentment which are hard to overcome. Knowing the group and the problem are important in determining the timing of this particular task maintenance function. Here are some examples:

- "I thought we could begin by hearing a two-minute report from each person on the project."
- "Should we work on this as an entire group or divide into subcommittees?"
- "What is the best way to tackle this issue?"
- "Let's first review the results chronologically, then by product line, and third by territory. Then we can open up for questions."

Each of these statements gives the group a way to begin working. In some cases, the initiation is really asking the group which is the best way to proceed. A great deal of time is lost and frustration builds when procedures are neither initiated nor adopted.

Giving Information or Opinions Contributing information and ideas is something most people do without much prodding. There are some exceptions, such as those who need encouragement to speak up, but finding people to talk is not usually difficult. The problem is more likely to be how to control the amount and direction of the conversation. Before reaching any conclusion, a group should first ask, "What do we have to go on?" "How do we know this is a problem?" "What has happened so far?" So individuals offer facts, their own views, interpretation of information, experience, personal values, and hopes. Since this behavior is so common, every manager should be particularly skilled at giving information and opinions.

This means learning how to be brief; generally comments should last only a minute or two. A meeting is not the place to give a speech, and comments should be limited to one key idea. When you get the floor it is tempting to spill out every point you've wanted to make for the last half-hour. Covering several issues at once will confuse and sidetrack the meeting, so discussion should take place on an orderly basis. Make your point briefly when the topic arises. Check yourself for relevance. One of the most frequent complaints about meetings is people who wander off the track. (See the discussion of self-oriented behaviors, below.)

How free do you feel to give information or your opinion at a meeting? If you tend to be reticent, a review of your behavior and feelings about groups appears to be in order. There are numerous reasons why people are quiet in the presence of others. Some are:

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Anxiety about position in the group
Lack of clarity about the goals
Fear of being wrong in front of others
Sense of not being able to express oneself

Each of us will have one or more of these feelings in some situations; they are quite realistic. If, however, these feelings frequently keep you from participating, you need to examine their basis. Don't be too quick to denigrate your own contribution, and thus keep it from the group. Although most managers could do with some monitoring to reduce tangents, others need to take more risks in making a contribution.

All groups need people who are good listeners, but as with other behaviors, that task should be shared by group members. Balance your silence with some participation. Planning should be useful to you in seeing where and how you can make contributions.

Seeking Information or Opinions A characteristic of good problem solvers is that they know what questions to ask, not that they have all the answers. Framing a question in such a way as to get a new view on the problem, to get a contribution from a person who hasn't spoken, asking why instead of accepting conclusions has great impact on the outcome of the task. At meetings you will need direct, open, and clarifying questions. (See Chapter 5 for material on how to frame questions.) Loaded questions may get asked, but they do not contribute much to trust, honesty, or the ability of members to get complete, accurate information.

Questions are sometimes used to give an appearance of inquiry so that people have the "feeling of participation." The best way to achieve participation is to encourage people to talk to each other. If your questions are only a guise and the answers have already been determined, you are wasting your time and that of the other people. Furthermore the dishonesty will only contribute to a lack of credibility which will make it difficult to get anything done.

Clarifying and Elaborating Clarifying means clearing up confusions (not adding to them), defining terms which have been used in different ways, and indicating where more information is needed. When the eight members of your task force represent different departments, it is likely that a lot of clarifying will be needed to help people understand each other.

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Elaborating involves giving an example, detailed illustration, or reinforcing the point with your own experience. A common but ineffective way that people attempt to clarify is, "I think what Gerry was really trying to say is. . ." Most of us resent others putting words in our mouths or implying that we were not very clear. If you want to clarify a previous comment, start with, "What I believe this means is. . ." or "I hear Gerry saying. . ." These qualifiers are needed because you don't *really* know what the other person was trying to say.

Questions are often used to clarify, to seek out more information, to eliminate certain possibilities, to make sure the point is complete before moving on. Without clarifying and elaborating, the group may move too quickly, resulting in a superficial analysis or misunderstanding. Another risk of too little elaboration is that you may assume all the data are in place when pieces are missing.

This caution needs to be balanced against the possibility of developing "analysis paralysis," a condition which afflicts many organizations. The need to gather more data, do one more piece of research, find out what every department thinks before acting keeps you from acting decisively. It is a difficult line, but there is a balance between being complete and accurate and being paralyzed.

Summarizing and Evaluating You have seven people in a room at a 90-minute committee meeting. If the time were equally divided, each person will have talked about 13 minutes. A lot of conversation occurred in that time, and different views were expressed. What the group clearly needs is someone to help put these points together into a coherent whole, to reflect accurately what others have said and state simply what has happened thus far. When summarizing, restate different points of view which have been presented, indicate areas of agreement and disagreement, and repeat questions raised which are still unanswered. Summaries should be brief and impartial, that is, they should reflect what the group has done thus far, not just your own thinking. How often have you been at a meeting where the leader said, "Well, then I guess we are all agreed," when it appeared to you and others that no agreement had been reached. This is not a summary but an example of using power to override the group.

Summaries should be done after each major point on the agenda. They serve a number of purposes:

- Reminding the group of accomplishments
- Focusing attention on the topic
- Providing a transition for moving to the next point
- Preventing misunderstanding at a later point

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If the summary is done well, the group should be able to move to the next item of discussion. It takes a lot of careful listening to summarize. If you have been preoccupied with your own comments and did not pay much attention to others, you will not be able to give a good summary. When summaries are going to be particularly critical to the discussion, you should stay out of the active discussion, ask questions to clarify, take notes, and from time to time review the group's progress with your summary.

Consensus Testing Before making a decision, find out where each person stands on the issues. The purpose of consensus testing is to discover the degree of difference, to define alternatives and priorities, not to push for agreement. This may take the form of asking if the group is nearing a decision, discovering areas of agreement and disagreement, "sending up a trial balloon" to test a possible conclusion, and seeking common ground.

A good technique for consensus testing is to state the issue and then go around the table and ask each person to react briefly. Do not allow discussion to continue during this time until everyone has spoken. If one or two people have obvious influence on the group, do not start with them, as they may begin a chain of agreement, when in fact, such agreement does not exist. Use consensus testing to move out of unnecessary discussion, to get through an impasse, and to check group procedures.

Giving Assignments Many problems will take more than one meeting, necessitating assignments before the group is to meet again. At staff meetings the manager often has to make assignments for the handling of the workload, for the carrying out of special projects, and for getting information for a next step. Sometimes it is obvious who needs to carry out a particular task, so assignment is made easily in these cases. On other occasions it will be better to ask who wants to do a particular task.

"Bill, since you have the production records, how about getting the monthly data together for the next meeting?"

"Jane, you have had experience in handling this procedure. Can you do an outline?"

"Ray, your people have made this kind of change before. Why not talk to them and report on what problems they encountered?"

or

"Who wants to talk to the unit supervisors and find out their personnel requirements for next year?"

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"Will someone volunteer to go to Financial Controls and get their figures on this?"

"Does one of you have the staff available to research what other companies have done?"

Making assignments can save group time; individuals can do background work rather than everyone struggling with a lack of data and using more time than is necessary.

The makeup of the group and the nature of the task will largely influence how assignments are made. Don't let a meeting close with loose ends that need to be addressed before your next discussion.

Group Maintenance Behaviors

The second set of behaviors needed for effective meetings focuses on how the group is functioning. Group maintenance is often neglected because managers want the group to be completely task-oriented. Helping people to communicate, resolve differences, and feel comfortable with each other is sometimes seen as unnecessary to the work. The work itself and *how* it gets done are inextricably related, thus group maintenance needs as much attention as task maintenance.

Encouraging Participation At the next meeting you attend, look around the room and notice people's reactions to each other before the meeting begins. Are they talking to each other, smiling, acknowledging a newcomer's presence, and in general getting comfortable? Before and during the meeting, participants react to each other in ways that signal what the environment will be like. Is there a feeling of tension, of opposing sides coming together to do battle, or is this a group which has come together to resolve a problem which matters to everyone?

Many of the ways in which we encourage participation are nonverbal. We set up the room so that people can look at each other instead of at the back of someone else's head, we nod approval or agreement to a comment, or we simply acknowledge another person's presence. There are, of course, more direct ways of encouraging participation, such as asking nonthreatening questions which open up the issues, indicating the need for special knowledge someone else may have, or seeking elaboration on a point.

In addition building on someone else's comments is a way to encourage further contributions. "Anne indicated that her unit had been successful in having clerks handle the service calls. I wonder if the rest of us could try the same approach." This statement lets Anne know that you not only heard, but valued her comment. Minority points of

view need to be supported or the group may overlook valuable contributions. This is not to say that tangents should be encouraged, but only that people need to feel free to disagree if a problem is to be openly and completely covered.

Gatekeeping Controlling and directing the flow of communication is often the leader's primary job at a meeting. There are three primary ways to be a gatekeeper: encouraging those who haven't participated, suggesting procedures to regulate the flow of communication, and managing those who are dominating or disruptive. As there are different responses to each dysfunctional behavior, I deal with such behavior separately later in this chapter.

Gatekeeping involves being a good listener, both hearing what people are saying and observing their nonverbal reactions. Watch for signs that someone is having difficulty breaking into the discussion. You will see people leaning forward or an expression which indicates that they have something to say. Some people are more aggressive verbally than others and speak up more quickly or more forcefully.

Another way to encourage participation is to ask a question which everyone can respond to or to deliberately state that you would like to hear everyone's view and go around the table until you have heard from everyone. Ask for specific information from a reticent member if you are reasonably certain that the person has something to contribute. Members will resent being called upon if they really have nothing to say and may add to tangents and waste time. You can suggest procedures such as, "Let's hear from everyone before we move on to the next item," or, "Each department will have a few minutes to present its budget before we begin general discussion."

An important factor in gatekeeping is how individuals feel their comments will be received. When evaluative statements are made before thorough discussion ("That's a terrible idea!"), some will feel discouraged and be unwilling to subject themselves to attack. Your responsibility as a gatekeeper is to keep the channels open, not only to allow but to encourage full participation.

Reducing Tension During discussions of matters important to individuals or to the units for which they are responsible, tension is likely. This is not necessarily harmful, for disagreement is a healthy sign in a group. But how the disagreements are handled is critical to success of the group and the accomplishment of the task. Disagreements over issues sometimes become conflict between individuals. Managing differences on issues is covered later in this section. To say, "Let's keep to the

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facts and not get personal," is to ignore people's personal investment in a particular point of view or the outcome of a decision. Long-standing hostilities between people cannot necessarily be left outside the conference room door.

Tension may arise simply because it's been a long day, people are tired, or resolution seems impossible. Reducing tension means to mediate personal differences between members. You can do this by helping them to explore differences, moving to another topic, inviting others to participate, or using humor. Be careful not to be sarcastic or put a group member down. The message is not lost on others who may become reluctant to participate and unwilling to risk the sarcasm of the leader or another member.

Clarifying Communication Throughout this book communication has been described as a process of trying to understand another's meaning. Realizing that experience gives rise to different meanings for the same words will help you to see the need for clarifying communication. A great deal of time is consumed in meetings by people responding to their own meaning and not to what actually was said. If people seem to be talking past each other or making assumptions which have not been checked out, you should try to clarify the communication. Paraphrasing is an excellent technique which can be used on these occasions: "What I heard Gary saying is . . ." or, "Before we continue I want to check back with Al to see if we understood his point." This simple way of checking out meaning enables the group to refocus their attention on the original comment and try to achieve a common degree of understanding. If you don't understand what someone has said, ask for an example, summarize the key points, or simply say, "I don't understand what you mean." Be careful not to interpret and tell what *you* think the person was really trying to say. Only reflect what was actually said. If one or more members are having difficulty understanding each other, ask them to paraphrase before the discussion continues.

Nearly everyone has had the experience of going to a meeting, then reading the minutes or talking to someone else who attended and wondering if they were at the same meeting. If seven people are in the room, seven sets of meaning will develop. You cannot achieve complete understanding, only work to minimize misunderstanding so that your goals are met.

Managing Differences One of the reasons meetings are called is that people have different sets of information and different points of view. Some conflict, then, is inevitable. If you are uncomfortable with

GETTING WORK DONE AT MEETINGS

people disagreeing, and try to minimize differences before they are fully explored, the quality of the decision will be reduced.

The first thing to do with a disagreement is to make the differences explicit.⁵ Too often managers will gloss over differences in an effort to achieve harmony. Ask how this person's view differs from that of others. Use questions to clarify and discover if there is a real difference. Paraphrase to accurately reflect what has been stated. Check out assumptions which may not have been tested.

Once the various positions are clearly stated, work toward resolving the differences. To keep the discussion on the issues and not on people, acknowledge the validity of the position for that person; seek to understand it before you counter with your own arguments. Often differences are muddled because so many points are being dealt with at one time. Stick to one point at a time, outline the key issues, use summaries as you move along, and try consensus testing to discover the degree of difference.

Differences can be based on distortions of information, biases in judgment, failure to listen, and individual, rather than group, goals. Differences also legitimately arise when people have accurate information and judgment, have listened, and are aware of group goals. One of the keys to an effective organization is the ability to balance some built-in conflicts. Marketing and manufacturing have differences which result from their separate roles in the organization. The differences should not be submerged or ignored, but rather brought into the open so problems can be resolved.

Managing differences requires flexible behavior, the ability to change your mind when a strong case has been made, to acknowledge the difficulties experienced by someone else, and to consider options rather than one course of action. Task accomplishment can be greatly enhanced by someone who is skillful in managing differences.

SELF-ORIENTED BEHAVIORS

If you have attended more than one meeting in your career, you have probably encountered people whose behavior is disruptive and dysfunctional. They are oriented toward the self rather than toward the needs of the group. All of us, at one time or another, act in a self-oriented manner. When you encounter behavior disruptive to others, you need to know how to respond to the self-oriented individual.

⁵ These concepts are based on material supplied by Billie Alban.

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You can find a number of descriptions of self-oriented behaviors in various books on leadership and conferences. The ones discussed here are most common to groups in organizations. You can add to the list.

- Blocking
- Seeking recognition
- Dominating
- Using status
- Irrelevant response
- Disapproving
- Working a hidden agenda

Blocking Blocking means someone is disagreeing long after most have come to agreement, bringing back an issue clearly rejected by the group, opposing something without clear reasons or in contradiction to the available data. Do not confuse the need for the group to disagree, as discussed earlier, with blocking.

When confronted by this behavior, try to move the discussion to the next point. You can request that the objection be considered privately or at a later time, summarize, and then move to a new issue, limiting the amount of time to be given to further discussion. Honestly try to find merit in one of the points to help the blocking person feel at ease and accepted by the group.

Seeking Recognition As with other activities in organizations, meetings can be used to advance personal status. Some members may want to get a favorite view across for their own credit, others may need to gain recognition by long or technical explanations. The signals of seeking recognition are excessively calling attention to oneself by unusual behavior such as coming in late and bursting into the discussion, boasting, and reporting on personal achievements. A person who is seeking recognition will have a hard time giving the floor to others and may have difficulty seeing the validity of others' comments.

Respond to someone who is seeking recognition at the expense of the group by acknowledging the person's contributions (where you can do so honestly), emphasize the group's goals, try to see how the comments fit into the discussion. If all else fails, change to a different topic on the agenda. You may find that a talk between meetings is needed to reassure the recognition seeker. You need to be sensitive to what may be anxiety on this individual's part, without sacrificing the legitimate recognition of the other members.

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Dominating Who of us has not dominated at one meeting or another? Perhaps the topic made you loquacious, or your expertise was needed for most of the points on the agenda. There are times when it is appropriate for an individual to take up a significant amount of the group's time. A dominating person who is self-oriented, however, tries to manipulate the group, interrupts others, frequently talks when others are speaking, and is unaware when others want to speak.

The odds of one person being able to dominate are lessened if the group is composed of individuals who will voice their opinions readily. Dominating, after all, means that those who do not dominate go along and are silent for a time. You may wish to give the dominating person some feedback after the meeting and discuss ways that the disruptor can contribute without taking over the group. During the meeting, be prepared to involve others, to ask questions that will generate another point of view, or deliberately start with someone else when introducing a new topic. If the comments have gone on too long, be prepared to break in when the person takes a breath and to move to another issue or a different person. Respond positively to some part of what was said, but don't, at the same time, encourage a new round of dominating behavior.

Using Status Solving problems is best done where status comes from experience, knowledge, and expertise, not from position in the hierarchy. Although most would agree with that statement, the reality often is that the person who carries the title of director, vice president, executive vice president, or regional manager has more influence than others at the meeting. This presents special problems to the leader and the other participants. The situation is especially difficult if the person who called the meeting is not the one with the most status in the group. Fortunately, some people are able to handle their roles and do not try and exert special influence on the group. Others, either directly or by implication, may use their positions to sway the group, to evaluate the comments of participants, or even to insist on a particular course of action. Handling someone like this at a meeting calls for great tact and skill.

If you know someone who is likely to use status to the detriment of the group, use the guidelines given under "planning schedules" earlier in the chapter to avoid inviting that person to the meeting. If you cannot avoid the situation, plan techniques in advance to try and control the behavior. Invite others who are strong enough to express views independently, prepare a clear and full agenda, be ready to use informa-

tion to make the best possible case, use consensus testing, and leave this person until last to reduce the possibility of influence.

Irrelevant Response Keeping a meeting on track can be a difficult task, especially when the group is large or represents multiple points of view. Determining just what is relevant is not always easy. Most often irrelevant responses come from people who have not been listening or who are so concerned about their own point of view that they do not acknowledge what others have said. Introducing a new topic without warning, or bringing up information which has little bearing on the point are both irrelevant responses. In any meeting, a few comments will be less relevant than others. The plant manager thinks he is illustrating a point on service by relating the way he handled a machine problem to the purchase of new equipment for the home office, but others miss the connection. Here, however, we are concerned about the person who consistently sidetracks the discussion and takes time for matters that need not be dealt with at the meeting.

You have to make a judgment as to how this person will react to questioning before deciding how to handle the situation. You can ask in an objective way how the point related to the discussion, but do not attack. If you say, "That doesn't have any bearing that I can see; explain it," in a threatening tone of voice, the person may further elaborate only to defend the position. You may acknowledge the comment briefly and then move on to a summary, ask for others' reactions to guide the discussion in a new direction. If you are using an agenda, refer to it and check with the group as to whether or not they want to spend time on this particular topic. Offer to discuss the point with the person outside the meeting, or call the group's attention to the time limits for this meeting.

Aggressing When members are behaving aggressively, they frequently disapprove of the values and feelings of others. Notice this does not say that they disagree with ideas or information. Aggressing is a much more personalized behavior. Another way to be aggressive is to deflate the status or position of others: "People in research never do know what goes on." Or an individual may take credit for other members' contributions.

The person who behaves aggressively at meetings may need reassurance as to the value of his or her contributions; give recognition without undue flattery. Be sure to give credit to each person for his or her ideas. If disapproval is expressed, try and find out the basis for that disapproval; if appropriate, discuss further.

GETTING WORK DONE AT MEETINGS

Hidden Agenda An individual's behavior at a meeting may appear confusing because of personal goals which are not clear to others. Some members may be aware that the individual has a private goal but there is tacit agreement to pretend they do not know. For example, organizations have topics which are "taboo," things that everyone knows about but no one discusses.⁶ The hidden agenda may be a taboo topic or could stem from personal goals. People with hidden agendas can consume a lot of time and undermine the group.

At a meeting to select a manager for a new field office, the vice president of the eastern region may reject all the candidates without clearly stating the reasons. This vice president may have a particular candidate in mind who will be suggested after the group has apparently rejected everyone else. This spirit of covert competition can be most destructive because it cannot be dealt with openly.

When planning a meeting, you may realize the potential of some hidden agendas. One possibility is simply to ask each person for personal (or functional unit) goals, openly recognizing that such goals exist. This could get some of the agendas into the open where you can at least deal with them. You may need to spend time with individuals on a one-to-one basis outside the meeting to find out more about their needs and how the group is seen. Helping a person to understand and be committed to the group goals can be a powerful way to reduce the impact of hidden agendas. When membership in the group becomes important, private goals may recede.

LEADERSHIP AND MEETINGS

People have widely varying beliefs and feelings about leadership and what is the most effective way to behave as the leader in a group. Although there are many approaches to this topic, a view which has been most useful is to define the leader as a person seen by the group members as having influence and helping to fulfill their needs.

This definition implies a functional approach to leadership which emphasizes what the leader *does*. In the functional view, leadership is shared; any and all members of the group may perform specific leadership acts or functions, such as stating a goal, summarizing, or encouraging others to speak. These functions must be supplied by someone if the group is to reach its objectives.

⁶ Fritz Steele, *The Open Organization: The Impact of Secrecy and Disclosure on People and Organizations* (Reading, Mass.: Addison-Wesley, 1975), ch. 12.

ASSESSING MEETING BEHAVIORS

<u>TASK</u>	Need to Practice To Know How to Do	Know How to Do Need to Do More Often	Know How to Do Do as Needed	Feedback From Others
Proposing/Informing				
Building/Informing				
Clarifying/Testing				
Summarizing				
<u>MAINTENANCE</u>				
Gatekeeping				
Clarifying Communication				
Compromising				
Encouraging				
Controlling Disruptive Members				
<u>SELF-ORIENTED</u>				
Seldom Do This	Do Occasionally Need to Control	Do Often/Need to Learn How to Stop	Feedback From Others	
Aggressing				
Blocking				
Seeking Recognition				
Dominating				
Irrelevant Response				

Name Of Meeting Participant

TASK

Proposing/Informing

Building/Informing

Clarifying/Testing

Summarizing

MANUFACTURE

Gatekeeping

Clarifying Communication

Comparing

Enseignement

Controlling Disruptive
Members

SELF ORIENTED

Aggressing

Blocking

Scalping Recognition

Dominions

Irrelevant Response

TASK BEHAVIORS DURING MEETINGS

BEHAVIOR	EXAMPLE	USES OF:
<u>PROPOSING/INFORMING</u> puts forth new suggestion or course of action; gives new data; increases groups level of information.	"I think we should start with the backlog status." "Let's break for coffee."	<ul style="list-style-type: none"> —helps group get started on the task. —offers suggestions for solving identified problems.
<u>BUILDING/INFORMING</u> expands or develops suggestions or proposals or data that have already been made (usually by someone else).	"I suggest we discuss how each of us locates missing information on the claim." "Yes, having one person take phone duty on a daily rotating basis will probably help us streamline our whole operation."	<ul style="list-style-type: none"> —refines ideas and makes them more understandable. —expands suggestions so that they are more practical.
<u>CLARIFYING/TESTING</u> clears up confusion; sees if ideas have been understood; asks questions to determine how valid the data is.	"Great, I second the motion." "Rotating would not only be more efficient, but would shift more responsibility to the approvers." "If I understand your reasoning..." "Bob, did I hear you say...?" "Joan, is your idea basically the same as Jim's?"	<ul style="list-style-type: none"> —gives re-enforcement to those who risk making new suggestions. —assures that people understand one another. —important behavior for an effective chairperson.

TASK BEHAVIORS DURING MEETINGS
 (Continued)

BEHAVIOR	EXAMPLE	USES OF:
<u>SUMMARIZING</u> restates ideas which have been presented.	"Bob wants to rotate phone duty weekly and Joan thinks it should be daily." "To recap, we have discussed what information is missing and two ways to change our procedures."	<ul style="list-style-type: none"> —gives short, impartial statements of what the group has done. —enables group to move on to a new issue. —makes final statements; everyone leaves with a clear idea of what to do. —gives individuals a chance to re-think the issues and be sure they understand and/or agree.

MAINTENANCE BEHAVIORS DURING THE MEETING

BEHAVIOR	EXAMPLE	USES OF:
<u>GATEKEEPING</u> helps others to participate; keeping the channels open for everyone; suggesting procedures to regulate the flow of communication.	"Let's hear briefly from everyone." "Comments should be limited to the agenda item." "Who else has some disagreement?"	<ul style="list-style-type: none"> —Builds an open and supportive climate which is receptive to new ideas. —Aids those who are less assertive verbally. —Provides balance to flow of communication.
<u>CLARIFYING COMMUNICATION</u> seeks to improve the level of listening among members. Members frequently respond to what they heard, which may be inaccurate, distorted, or incomplete.	"I understood you to say that this idea has the full support of our team." "I'm not sure we're using terms in the same way..." "I need some clarification."	<ul style="list-style-type: none"> —The group can be more productive and move more quickly when participants understand what others really meant. —Ensures accuracy of information.
<u>PROMISING</u> offering to explore differences between one's self and others; admitting error; yielding status; going halfway to meet another.	"Let's identify our areas of disagreement." "What alternative might be acceptable."	<ul style="list-style-type: none"> —Explores differences and attempts by members to smooth them over before they are fully discussed. —Asks for other points of view; locates the source of conflict. —Uses differences to help reach a more effective solution.

MAINTENANCE BEHAVIORS DURING THE MEETING
 (Continued)

BEHAVIOR	EXAMPLE	USES OF:
ENCOURAGING being friendly and responsive to others; indicating by facial expression or remark acceptance (not necessarily agreement) of others' contributions; indicating understanding.	"I fully support Joe's point." "Sara's experience is quite similar to mine."	Communicates support of ideas. Helps establish open climate. Particularly important to new or quiet members.
CONTROLLING difficult or disruptive members. Not allowing one or two to interfere with meeting goals.	"We need to be aware of time Michelle; let's move on." "Terry, perhaps you and Tom can discuss that point later." "Where does your example fit into the discussion?"	Helps the use of time by not allowing side issues. Lets members know that the meeting is under control. Encourages self control of behavior.

SELF-ORIENTED BEHAVIOR

BEHAVIOR

1. Aggressing:

deflating the status of others; expressing disapproval of the values and feelings of others; taking credit for others' contributions.

2. Blocking:

being negative and stubbornly resistant; disagreeing and opposing without or beyond reason; bringing back an issue clearly rejected by the group.

3. Seeking recognition:

excessively calling attention to oneself by "unusual behavior"; boasting and/or reporting on personal achievements.

4. Dominating:

asserting authority or superiority to manipulate group; interrupting others.

5. Irrelevant response:

responding in a way that seems unrelated to what another has been saying; introducing a new topic without warning.

WHAT TO DO

Clearly give members credit for ideas; directly discover the basis of disapproval; indicate directly the value of all members' contributions; give recognition to his/her status without undue flattery.

Request that his/her objection be considered at a later time; ask to move to a new issue after a summary; limit the amount of time to the discussion; honestly try to find merit in one of his/her points.

Try to make each person feel accepted for valid contributions; emphasize the group's goals; acknowledge his/her comments and change to a new topic.

Spend a few minutes deciding whether suggestions are of value; get feedback from other group members on the comments; suggest that others may have ideas; do not be afraid to disagree.

Calmly ask for relationship of his/her point to the discussion; acknowledge comment but do a summary before continuing; ask to let other member finish contribution.

MODULE V

RUNNING EFFECTIVE MEETINGS

Module V: "PROBLEM PEOPLE"

SYNOPSIS

People with all types of constructive and obstructive motivations attend meetings. What should a meeting holder do when obstructionists or "problem people" attend meetings? Module V answers this question and in doing so draws heavily upon participants' experience.

OBJECTIVES

Participants will be able to

1. identify "problem people"
2. discuss various solutions for dealing with them.

1. "The Silent One"

This type has been known to exhibit one or more of the following behaviors:

- says little or nothing during the meeting
 - responds, if at all, with brief, yes-no type answers
 - very little body language; hard to read his/her position on an issue.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

2. "The Interrupter"

This type has been known to exhibit one or more of the following behaviors:

--cuts others off.

--frequently impatient to talk and communicates a sense of urgency.

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

3. "The Broken Record"

This type has been known to exhibit one or more of the following behaviors:

- brings up the same point repeatedly.
 - doesn't seem to hear when others acknowledge his/her input.
 - talks too much.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

4. "The Latecomer"

This type has been known to exhibit one or more of the following behaviors:

- frequently, or always, arrives late.
 - makes a commotion, moves chairs, other objectives.
 - disrupts meeting flow by asking to be brought up to speed.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

5. "The Dropout"

This type has been known to exhibit one or more of the following behaviors:

- doesn't say anything or makes perfunctory comments.
 - physically withdraws from the group; e.g., moves his/her seat away from the group.
 - puts physical barriers between self and group.
 - doodles, reads unrelated material, and/or stares out the window.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

6. "The Attacker"

This type has been known to exhibit one or more of the following behaviors:

- launches personal attacks on other group members.
 - tends to turn a discussion into a heated, win/lose confrontation.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

7. "The Answer Person"

This type has been known to exhibit one or more of the following behaviors:

- rushes to judgment on most issues.
 - states they have the answer without even knowing what the real problem is.
 - tends to short-circuit the multistep, problemsolving process.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

8. "The Early Leaver"

This type has been known to exhibit one or more of the following behaviors:

- leaves before meeting is over, thereby drains energy by leaving early.
 - disrupts flow of meeting.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

9. "The Doubting Thomas"

This type has been known to exhibit one or more of the following behaviors:

- constantly "puts down" suggestions, ideas, and concepts.
 - picks apart ideas.
 - expresses negative opinions about most issues.
 - overly skeptical; pessimistic about the possibility of success.
-

Some ideas on how you may deal with this type are:

Other ideas on dealing with this type, generated by your class, include:

DEALING WITH PROBLEM PEOPLE IN YOUR MEETINGS

As a general guideline for dealing with problem people, you should attempt to keep a balance between protecting the problem individual from being attacked by the other participants and protecting the other participants and the task from the problem individual.

One helpful sequence of responses to dealing with some types of problem individuals is as follows:

1. **Accept.**

Let the person know you are aware of his/her behavior.

In some cases you may wish to clarify your perception of the person's behavior by asking the person to elaborate.

2. **Legitimize.**

Acknowledge that it is legitimate to feel as the person does. You might point out how the group may be helped if a different viewpoint is introduced.

3. **Defer.**

If the problematic behavior occurs at a critical point in the meeting, attempt to defer a discussion of the problem individual's behavior and/or concerns. If this does not work, then a graduated response is appropriate.

4. **Graduated response.**

Start with the most subtle and least threatening response. If necessary, move to less subtle responses, and as a last resort move to more threatening response.

In other words, you should move from win/win to win/lose responses. An example of using graduated responses with someone who is attempting to dominate the meeting is as follows:

- a. Look at the person directly, acknowledge and thank the person for his/her contribution and quickly call on someone else.
- b. Follow the same procedure, but move physically close to the individual.
- c. Talk to the individual during a break and ask if he/she is aware of his/her dominating the meeting. You might ask why he/she is dominating the meeting and not allowing other people an opportunity to talk. Do not forget to discuss it later.
- d. As a last resort, you may have to confront the person in front of the group and ask the same question(s) as above.

SPECIFIC GUIDELINES:³

Some common types of problem people and some suggestions for dealing with them are as follows:

1. The interrupter.

This person starts talking before other people finish saying what they want to say. You should deal with this person immediately by saying something like, "Mary, please hold your comment until Joe finishes what he wants to say." If the person is a chronic interrupter you can talk to the person during a break and point out how irritating the interruptions are to you and/or the group. You might suggest that the interrupter write down ideas until there is a more appropriate time to express them. Another approach is to give the interrupter a lesson in listening by appointing him/her the group's recorder.

2. The loudmouth.

This person talks too loud and too much, dominates the meeting, and appears to be unstoppable. The graduated response described above is the most effective way of dealing with this person.

³Doyle, M. and Straus, D., How to Make Meetings Work, Chicago, Ill, Playboy Press, 1976, pp. 201-211.

3. The doubter.

This person picks apart everything. Everything is wrong until it is proven to him/her that it is right. A technique for dealing with this person is to get the group to agree to withhold evaluation of ideas until later. If someone violates this agreement, you can remind the person that he/she and the group agreed to not evaluate now.

4. The broken record.

This person brings up the same point repeatedly. You can deal with this person by stating that the point has been brought up before and will be considered by the group. Ask the person if he/she has anything new to add. If not, move quickly to someone else. If the person appears to be still worked up over the issue, you might give the person "one last opportunity" to discuss the point. It is suggested that you state how many minutes the person has to talk, then enforce the time limit. Also note the importance of a recorder who can point to his/her notes (or flip chart) and state that the point has been captured, thus there is no need to continue covering the same ground.

5. The attacker.

This person launches personal attacks on group members. You can use several techniques to deal with this person. You can move physically between the attacker and the person being attacked and get them to talk to

you instead of to each other. Reminding the attacker that the meeting is to deal with tasks, not personalities or personal problems, is another technique. You could suggest that the personal issues be worked out after the meeting and that you would be willing to act as a third party. Move close to the recorder and/or direct attention toward the recorder by commenting on the importance of correctly recording the attacker's criticisms that relate to the task and not the personalities. Also, you could suggest that ideas be evaluated later.

6. The latecomer.

This person usually arrives at meetings late and asks to be informed of what he/she missed. Usually it is best to avoid confronting the person in front of the group. Embarrassing someone in front of other people can lead to that person taking the offensive or withdrawing from the group. After the meeting ask the latecomer in private why he/she is usually late. If the reason is related to the meeting, e.g., "I do not come because these meetings are a waste of time," ask the person for suggestions to improve the meeting.

7. The dropout.

This person usually sits at the back of the room and appears to have "tuned out" the meeting. Since appearances are sometimes deceptive, this person might be thoroughly concentrating on the meeting. You can walk

up near this person or wait until you have eye contact and then ask a question. If you do not get an instant response, you can take the dropout off the hook by turning to someone else and asking for his/her opinion on the subject. You could then come back to the dropout later. You might learn something about the effectiveness of your meeting by asking this person during one of the breaks why he/she is not participating.

8. The headshaker.

This person nonverbally disagrees with what is being said. Headshakers shake heads, push chairs back, slam books shut, roll eyes, cross and uncross legs, etc. You can try ignoring this individual or deal with the nonverbal behavior. If you choose to deal with the nonverbal behavior, you can state that the person is giving you nonverbal signals that may suggest he/she disagrees with what is being said. Then ask if this is true, and if it is ask why. Continued disruptive nonverbal behavior may have to be dealt with during a break. You may have to tell the person that his/her nonverbal behavior is annoying and disruptive.

9. The know-it all.

This person uses his/her credentials, experience, age, seniority, etc., to argue a point. You can deal with this person by first acknowledging his/her expertise and emphasizing why the issue is being considered by

the group. If the person persists in using his/her credentials, you might have to state that the credentials could be acting as blinders.

10. **The busybody.**

This person is always ducking in and out of the meeting, constantly receiving messages or rushing out to take a phone call or deal with a crisis. What is worse, the busybody is often the manager or senior person in the meeting. That is why he or she feels so free to come and go, but by doing so the busybody ends up wasting his or her time and the other participants' time. During each departure the meeting may come to a standstill or the busybody has to be briefed upon reentry. Often there is no point in continuing a meeting if a key person is absent. As a facilitator, it is almost impossible to deal with a busybody during the meeting. Only group members or the manager/chairperson can exert any real pressure on the busybody to stop the interruptions and remain in the meeting. You can recommend that the meeting be recessed or adjourned until the busybody can attend without interruptions. At least this preserves other participants time and energy and helps to demonstrate to the busybody that his or her actions are disruptive.

The best time to deal with a chronic busybody is before the meeting. Point out how maddening and

inefficient this behavior is and see if you can get the busybody to agree to hold all calls for the duration of the meeting; or you can meet away from the busybody's office where there can be no interruptions. Another possibility is to schedule the meeting before or after normal business hours to minimize distractions. In any case, if you can get the busybody to make a commitment to remain in the meeting for a given time without interruptions before the meeting, you will have some leverage you can use if the individual resumes busybody behavior: "Hey, just a minute! I thought you promised to hold all calls for the next hour."

11. **The whisperer.**

This person is constantly whispering to a neighbor and is one of the most irritating problem people. It is very hard to concentrate with two people whispering and giggling near you. But many group members do not have enough courage to object. As facilitator, try walking up close to the whisperers. Often this low-key intervention will work. If a lot of whispering is going on, you can say looking around the room: "Hey, let us keep a single focus here! We won't get anything done if people are going off in different directions." If two cronies are really going at it, you can stop the meeting and say "Do you want to share what you're talking about with the rest of the group? If not, won't you go

outside the room to talk? We still have a lot of work to do here." At a break, ask them what's going on. A very subtle technique is to find a way to get chronic whisperers to sit apart from each other.

12. The early leaver.

This is the person who drains the energy of the meeting by leaving before it ends. Like the latecomer, this individual shouldn't be confronted before the group. Find out later why this disruptive behavior continues. Maybe your meetings are too long or too loose. Maybe you can learn something from the early leaver.

At the beginning of the meeting, check to see if everyone can stay until the end. If all the participants commit themselves to staying, a potential early leaver is less likely to sneak out. If one or more people announce that they are going to leave early, find out when and decide at the beginning of the meeting whether you will continue without these members. There is nothing worse than continuing with people slowly wandering out. It's like sitting in a bathtub and watching the warm water drain out around you.

MODULE VI

RUNNING EFFECTIVE MEETINGS

Module VI: RECORDER

SYNOPSIS

Information exchanged in a meeting has a way of being misinterpreted, unnecessarily repeated, or lost. Solving these and other information problems can be accomplished by employing a meeting recorder. Responsibilities of a recorder include capturing the key ideas and facilitating accuracy by making participants' comments visible.

OBJECTIVES

Participants will be

1. aware of the need and role of a recorder.
2. aware of recorder techniques.

What a Recorder Can Do

1. Capture key ideas.
2. Help concentration.
3. Avoid repetition.
4. Facilitate brainstorming.
5. Facilitate accuracy.
6. Aid summary and review.
7. Encourage participation.
8. Enhance sense of accomplishment.

SUGGESTED TECHNIQUES FOR MEETING RECORDERS

- Write clearly in a large, clear hand while standing up.
- Concentrate, listen carefully, write down key words quickly.
- Check with group for accuracy of content.
- If you fall behind, stop the group and ask them to help you catch up.
- Abbreviate words; don't be afraid to misspell.
- Use arrows, stars, underlining, different colors, etc., to highlight.
- Circle key ideas, statements, or decisions.
- Number all easel sheets.
- Mount completed papers in convenient order on the walls.
- Support the facilitator in guiding group discussion.

MODULE VII

RUNNING EFFECTIVE MEETINGS

Module VII: FILM - "Meetings' Isn't There a Better Way?"

SYNOPSIS

The film depicts the common frustrations of an ineffective meeting and specifies the components of an effective meeting. The 30-minute film highlights the kinds of meetings held and how they can achieve the initiator's desired outcomes.

OBJECTIVES

Participants will be able to

1. recognize meeting deficiencies.
2. state the keys to better meetings.

M E E T I N G T Y P E S

PRESENTATION:

One or more persons presents information. The emphasis is on one way communication from presenter to his/her audience.

- A. Lectures
- B. Briefings

Example: EIC presents potential audit program to the members from divisions and regions expected to head up the audit effort.

Participants should consider taking the course "Preparing Effective Presentations," (PEP) given by OOHD's Training Branch.

FEEDBACK:

The group shares information with one or more people and get their response.

- A. Reporting sessions
- B. Hearings
- C. Evaluation sessions

Example: Mid-point conference: Each site senior presents audit findings and considerations to EIC and group director but for the benefit of the whole group.

Note: You may use all four types of interaction in the same meeting.

M E E T I N G T Y P E S

DECISIONMAKING:

A meeting in which preliminary or final decisions are made, usually by a formal, horizontal group.

- A. Board meetings
- B. Commissions
- C. Top management

Example: Division management (Director, Deputy, Associate, Group Director, or EIC) decides on which findings will be used in the final GAO report.

Participants should consider taking "Managerial Leadership-TELOS" or "Managerial Decisionmaking" both offered in OOHD's Management Development Curriculum.

PROBLEMSOLVING:

A task-oriented meeting in which the group attempts to solve a problem or resolve an issue.

Example: A GAO audit of the use of consultants identified an apparent double billing scheme of a consultant to DOE. This resulted in a meeting with OGC to determine if there was a distinct legal issue and if so, how OGC should get involved.

MODULE VIII

RUNNING EFFECTIVE MEETINGS

Module VIII: MEETING SIMULATION

SYNOPSIS

This simulation provides participants the opportunity to practice what they have learned. One small group conducts a meeting while remaining participants observe and provide feedback.

OBJECTIVES

Participants will:

1. have an opportunity to practice the module concepts in a low threat, constructive atmosphere.

Meeting Simulation

BACKGROUND:

1. Work group:

--you are a group of GAO staff members

--you have worked together as a team for approximately 4 years. Length of service ranges from 1 to 8 years.

--your age and sex will not be changed by this role play.

--your team is comprised of well motivated, fully competent individuals.

--the group leader is respected and generally seen as effective in accomplishing the task.

--interpersonal relations within the group are satisfactory.

Specific Instructions:

1. Leader: a) read case, b) plan and write brief agenda, including role assignments, c) prepare brief opening remarks.
Separately, at the same time Time = 10 min.
 2. Members: a) read case, b) be prepared to help leader in deciding topics for agenda, and c) be thinking about if you want to be a recorder.
Then together
 3. Leader and Members: a) review leader's proposed agenda and make any changes needed, b) agree on who will be the recorder, c) allow recorder a few moments to review techniques for that role, d) allow members to take responsibility for meeting by referring to notebook; e.g., meeting checklist in last section. Time = 10 min.
 4. Complete task per your agenda. Time = 30 min.
 5. Debrief with entire class. Time = 20 min.

WILDERNESS SURVIVAL WORK SHEET

Here are 12 questions concerning survival in a wilderness situation. Your task is to select the best of the three alternatives given under each item. Try to imagine yourself in the situation depicted. Assume that you are in a group and have a minimum of equipment, except where specified. The season is fall. The days are warm and dry, but the nights are cold.

Your group will have the task of deciding by consensus the best alternative for each question. Your group solutions will later be compared with the "correct" answers provided by a group of naturalists who conduct classes in woodland survival.

ANSWER

1. You have strayed from your party in trackless timber. You have no special signaling equipment. The best way to attempt to contact your friends is to:
 - a. call "help" loudly but in a low register.
 - b. yell or scream as loud as you can.
 - c. whistle loudly and shrilly._____
2. You are in "snake country." Your best action to avoid snakes is to:
 - a. make a lot of noise with your feet.
 - b. walk softly and quietly.
 - c. travel at night._____
3. You are hungry and lost in wild country. The best rule for determining which plants are safe to eat (those you do not recognize) is to:
 - a. try anything you see the birds eat.
 - b. eat anything except plants with bright red berries.
 - c. put a bit of the plant on your lower lip for five minutes; if it seems all right, try a little._____
4. The day becomes dry and hot. You have a full canteen of water (about one liter) with you. You should:
 - a. ration it--about a cupful a day.
 - b. not drink until you stop for the night, then drink what you think you need.
 - c. drink as much as you think you need when you need it._____
5. Your water is gone; you become very thirsty. You finally come to a dried-up watercourse. Your best chance of finding water is to:
 - a. dig anywhere in the stream bed.
 - b. dig up plant and tree roots near the bank.
 - c. dig in the stream bed at the outside of a bend._____

Answer

6. You decide to walk out of the wild country by following a series of ravines where a water supply is available. Night is coming on. The best place to make camp is:
 - a. next to a water supply in the ravine.
 - b. high on a ridge.
 - c. midway up the slope.

7. Your flashlight glows dimly as you are about to make your way back to your campsite after a brief foraging trip. Darkness comes quickly in the woods and the surroundings seem unfamiliar. You should:
 - a. head back at once, keeping the light on, hoping the light will glow enough for you to make out landmarks.
 - b. put the batteries under your armpits to warm them, and then replace them in the flashlight.
 - c. shine your light for a few seconds, try to get the scene in mind, move out in the darkness, and repeat the process.

8. An early snow confines you to your small tent. You doze with your small stove going. There is danger if the flame is:
 - a. yellow.
 - b. blue.
 - c. red.

9. You must ford a river that has a strong current, large rocks, and some white water. After carefully selecting your crossing spot, you should:
 - a. leave your boots and pack on.
 - b. take your boots and pack off.
 - c. take your pack off, leave your boots on.

10. In waist-deep water with a strong current, when crossing the stream you should face:
 - a. upstream.
 - b. across the stream.
 - c. downstream.

11. You find yourself rimrocked; your only route is up. The way is mossy, slippery rock. You should try it:
 - a. barefoot.
 - b. with boots on.
 - c. in stocking feet.

12. Unarmed and unsuspecting, you surprise a large bear prowling around your campsite. As the bear rears up about ten meters from you, you should:
 - a. run.
 - b. climb the nearest tree.
 - c. freeze, but be ready to back away slowly.

MODULE IX

RUNNING EFFECTIVE MEETINGS

Module IX: Action Planning

SYNOPSIS

At this time participants are given the opportunity to prepare a realistic plan on how to apply course learning in their jobs. The emphasis is on those segments of R.E.M. which participants feel are most important. A structured form assists by asking a series of important questions such as "What do you want to do?, What will you do?, How will you do it?, etc."

OBJECTIVES

Participant will

1. prepare a realistic plan for how to apply course learning.
2. implement the plan on their jobs.

RUNNING EFFECTIVE MEETINGS

ACTION PLAN FOR APPLICATION

1. Please review the key elements of an effective meeting. Reflect on your own learning. Perhaps consider one or two of your own meetings that cause you the most difficulty. Or think of an area where you would have a good potential to enhance your meeting.
2. Based on the above, select one area for action. Briefly list what you want to do and your plan for doing it. Be realistic and specific.

A. What do you want to do?

B. What will you do?

C. What will you do first?

D. When will you do it?

RUNNING EFFECTIVE MEETINGS

ACTION PLAN FOR APPLICATION
(Continued)

E. Who has to know what you are doing?

F. How will you know it has been done?

G. How might you block yourself?

H. How can you overcome this block?

I. What will be different as a result of this action plan? How will you know you have made progress?

MODULE X

RUNNING EFFECTIVE MEETINGS

CHECKLIST

YES	NO
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I. In Planning your meeting did you:

1. Define what you want to achieve?
2. Consider alternatives, e.g., telephone, memo, not have the meeting?
3. Invite people who can truly contribute and/or benefit?
4. Prepare and distribute in advance an agenda that states purpose, preparation needed, and details?
5. Create a pleasing and facilitative environment?

II. In Conducting your meeting did you:

1. Make the participants feel that their attendance is necessary?
2. Follow your agenda?
3. Try to deal with, rather than try to ignore, human "process," e.g., conflict, anger, boredom, and frustrations?
4. Capture key data, e.g., decisions and assignments?
5. End by summarizing, evaluating, and unifying?

III. In Following-Up on a Meeting did you:

1. Review action items to ensure completion?

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